

canadean 

global
SOFT DRINKS



Soft Drinks Service

Individual Market

Carbonates Category Profile - Sample Pages
2010 Cycle

Canadean Contacts:

Debra Richards, Sales Support Manager: +44 (0)1256 394227

Alison Bodnar, Sales Support Administrator: +44 (0)1256 394287

Copyright

Information contained in Canadean reports is confidential and for use only by clients of Canadean with valid contracts. All copyright in these publications is reserved. No part of this report may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means (electronic, mechanical, photocopying, recording or otherwise) without prior permission of the copyright owners.

Liability

Whilst every effort has been made to ensure that information contained in this report is accurate and that opinions expressed are sound, Canadean Ltd cannot be made liable for any errors, omissions or incorrect information or for any loss or consequential losses arising as a result of decisions taken based on the contents of this report.

Canadean prints its reports on 100% recycled paper using 80% post consumer waste.

Visit the Canadean website @ www.canadean.com



Category Profiles available from the Canadean Soft Drinks Service:

| Bulk/HOD Water / Bottled Water / Carbonates / Dilutables / Energy Drinks / Iced/Rtd Tea / Iced/Rtd Coffee / Juice / Nectars / Sports Drinks / Still Drinks | | | |
|--|--------------------|--------------|----------------------|
| Asia | | | |
| China | Japan | Philippines | Taiwan |
| Hong Kong | Kazakhstan | Singapore | Thailand |
| India | Malaysia | South Korea | Vietnam |
| Indonesia | Pakistan | | |
| Australasia | | | |
| Australia | New Zealand | | |
| Americas | | | |
| Argentina | Chile | Guatemala | Paraguay |
| Bolivia | Colombia | Honduras | Peru |
| Brazil | Costa Rica | Mexico | Uruguay |
| Canada | Ecuador | Nicaragua | USA |
| Caribbean ⁽¹⁾ | El Salvador | Panama | Venezuela |
| West Europe | | | |
| Austria | France | Italy | Spain |
| Belgium | Germany | Netherlands | Sweden |
| Denmark | Greece | Norway | Switzerland |
| Finland | Ireland (Republic) | Portugal | United Kingdom |
| East Europe | | | |
| Belarus | Estonia | Poland | Slovak Republic |
| Bosnia-Herzegovina | Hungary | Romania | Slovenia |
| Bulgaria | Latvia | Russia | Turkey |
| Croatia | Lithuania | Serbia | Ukraine |
| Czech Republic | Macedonia | | |
| Middle East North Africa (MENA) | | | |
| Bahrain | Kuwait | Qatar | United Arab Emirates |
| Egypt | Lebanon | Saudi Arabia | |
| Jordan | Oman | Tunisia | |
| Rest of Africa | | | |
| Nigeria | South Africa | | |
| ⁽¹⁾ Data on 26 markets available to purchase individually: Antigua, Aruba, Bahamas, Barbados, Belize, Bermuda, British Virgin Islands, Cayman Islands, Dominica, Dominican Republic, French Guiana, Grenada, Guadeloupe, Guyana, Haiti, Jamaica, Martinique, Netherlands Antilles, Puerto Rico, St Kitts, St Lucia, St Vincent, Surinam, Trinidad & Tobago, Turks & Caicos, US Virgin Islands | | | |

More detailed annual reports, Wisdom databases and quarterly reports are also available from Canadean's full Soft Drinks Service. For more information on the Soft Drinks Service, Wisdom or any of Canadean's other beverage services or consultancy, please contact Canadean on +44 (0) 1256 394224 or visit www.canadean.com



CARBONATES CATEGORY PROFILE

| | |
|---|----------|
| CARBONATES - CATEGORY PROFILE | 2 |
| Carbonates Key Facts..... | 2 |
| CARBONATES COMMENTARY | 3 |
| Current & Emerging Trends | 3 |
| Outlook | 3 |
| Segmentation | 3 |
| Functional Products | 3 |
| Private Label/Private Label Producers..... | 3 |
| Marketing..... | 4 |
| Pricing/Valuation | 4 |
| Packaging..... | 4 |
| Distribution | 4 |
| Carbonates New Products 2009 | 4 |
| CARBONATES DATA TABLES..... | 5 |
| Carbonates Consumption 2004-2010F | 5 |
| Carbonates Consumption Forecast 2011F-2013F..... | 5 |
| Carbonates Segments 2008-2010F | 6 |
| Carbonates Packaging 2008-2010F | 6 |
| Carbonates Distribution 2008-2010F | 6 |
| Carbonates Leading Companies 2008-2009 - % Market Share | 7 |

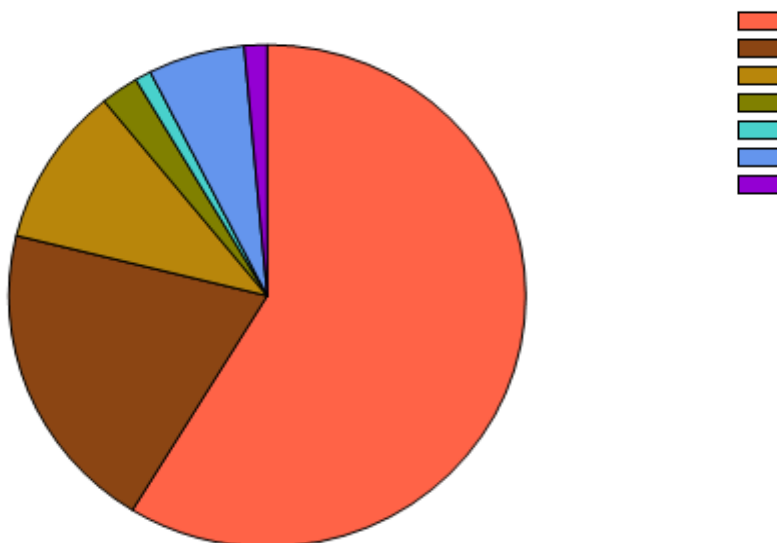


CARBONATES - CATEGORY PROFILE

| Carbonates Key Facts | | | | |
|---------------------------|-----------------------|--------------------------|---------------------|---------------------|
| Market Size | Million Litres | Litres Per Capita | | |
| Consumption 2009 | | | | |
| Growth | CAGR% 04-09 | CAGR% 06-09 | CAGR% 08-09 | |
| Consumption M Litres | | | | |
| Market Value | YTL Million | YTL / Litre | US\$ Million | US\$ / Litre |
| Value (at consumer price) | | | | |
| Segmentation 2009 | Regular | Low Calorie | | |
| % Share | | | | |
| Distribution 2009 | Off-Premise | On-Premise | | |
| % Share | | | | |
| Packaging 2009 | PET | Metal | Glass | Other |
| % Share | | | | |

SOURCE: Trade Interviews; Canadean Wisdom

Chart - Carbonates Leading Trademark Owners, 2009



SOURCE : Canadean Wisdom



CARBONATES COMMENTARY

Current & Emerging Trends

Outlook

Segmentation

Functional Products

Private Label/Private Label Producers



Carbonates Category Profile - Sample Pages

Marketing

Pricing/Valuation

Packaging

Distribution

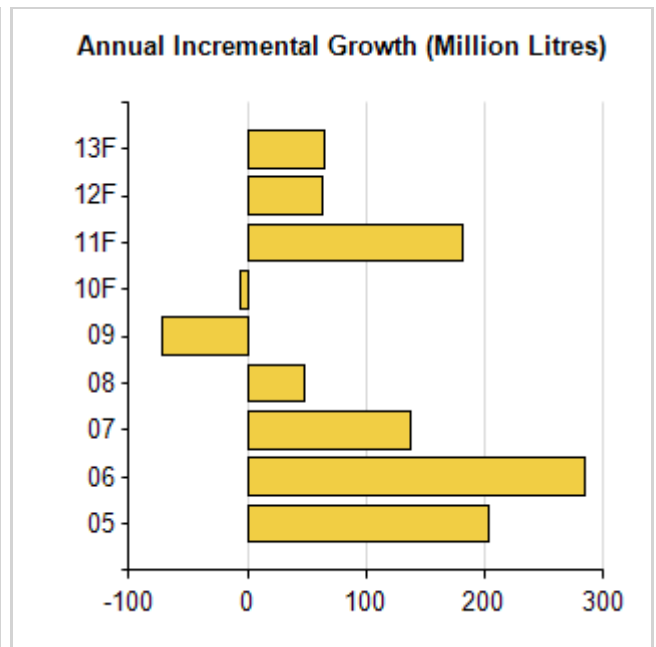
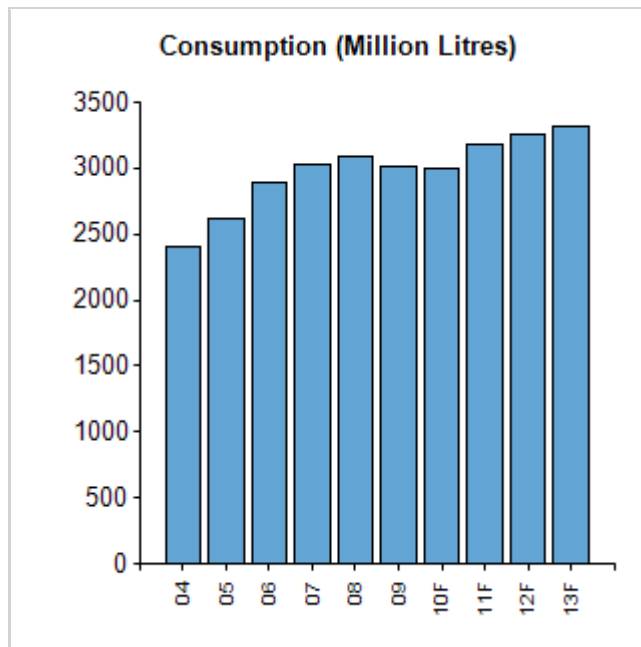
Carbonates New Products 2009



Carbonates Category Profile - Sample Pages

CARBONATES DATA TABLES

| Carbonates Consumption 2004-2010F | | | | | | | |
|-----------------------------------|------|------|------|------|------|------|-------|
| Year | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010F |
| Consumption (Million Litres) | | | | | | | |
| Litres per Capita | | | | | | | |
| Population (Millions) | | | | | | | |
| Million Cases (192oz or 24x8oz) | | | | | | | |
| 8oz Servings Per Capita | | | | | | | |



| Carbonates Consumption Forecast 2011F-2013F | | | |
|---|-------|-------|-------|
| Year | 2011F | 2012F | 2013F |
| Consumption (Million Litres) | | | |
| Litres per Capita | | | |
| Population (Millions) | | | |
| Million Cases (192oz or 24x8oz) | | | |
| 8oz Servings Per Capita | | | |



Carbonates Category Profile - Sample Pages

Carbonates Segments 2008-2010F

| | 2008 | 2009 | 2010F |
|----------------|------|------|-------|
| Total | 100% | 100% | 100% |
| Cola | | | |
| Orange | | | |
| Clear Lemonade | | | |
| Other Fruit | | | |
| Lemon-lime | | | |
| Other Flavours | | | |
| Regular | | | |
| Low Calorie | | | |

Carbonates Packaging 2008-2010F

| | 2008 | 2009 | 2010F |
|----------------|------|------|-------|
| Total | 100% | 100% | 100% |
| PET | | | |
| Metal | | | |
| Glass | | | |
| Board | | | |
| Non-Refillable | | | |
| Refillable | | | |
| Multi Serve | | | |
| Single Serve | | | |

Carbonates Distribution 2008-2010F

| | 2008 | 2009 | 2010F |
|------------------------------|------|------|-------|
| Total | 100% | 100% | 100% |
| Off-Premise (Retail/At Home) | | | |
| On-Premise (Away from Home) | | | |



Carbonates Category Profile - Sample Pages

| Carbonates Leading Companies 2008-2009 - % Market Share | | |
|---|------|------|
| | 2008 | 2009 |
| Total | | |
| | | |
| | | |
| | | |
| | | |
| | | |